8.1   DEFINE EDITS

Introduction

To define an edit test, you must specify a condition that must be true for an item or items in the survey (e.g., Item A + Item B = Item C). If the condition is not true (Item A + Item B <> Item C), then the item is identified as an edit "reject", to be investigated further at your discretion. Edits in StEPS identify failures; they do NOT change data.

!   Edit definitions are defined in the Survey Specifications module.

!   Only users with PARMPRIV = "P" may define edit tests. Survey managers will be responsible for determining which analysts will have this privilege.

!   All of the edits allow for a "pre-condition". A "pre-condition" is a set of criteria specified in the edit definition that must be satisfied in order for the edit test to be performed (e.g., perform this edit test if SIC = '36511')

!   There are 7 types of edit definitions in StEPS:

1.	Required Data Item	Verifies that a data value exists for a specified item. Data items that are 'required' may NOT contain a data value of missing '.'
2.	Range	Verifies that existing data values are within tolerance for a specified data item. A minimum and maximum value are specified for an item, and the data value must fall within that range.
3.	List Directed	Verifies that existing data values for an item match pre-defined values in a list. For example, potential data values for an item may be '1', '2', and '3'; therefore, the data value supplied must be '1', '2', or '3'. No other data value will be accepted.
4.	Skip Pattern Validation	Verifies that values of skip items are consistent with the skip instructions provided on the questionnaire. (Currently not available.)
5.	Balance	Verifies that the sum of detail items is equal to a data item total.
6.	Survey Rule	Free-form edit test that validates complex interitem

relationships within an observation. This test validates that an expression is valid, not that individual data items are valid. Any test can be entered as a Survey Rule edit, as long as it is syntactically correct.

7. Negative   Verifies that a data item does not contain a negative data value. (Currently not available.)

NOTE: Each of these different types of edits is explained in detail in sections 8.1.1 - 8.1.7

! 4 different types of edit "events" can be specified for any given edit test: Single ID, Pre-edit, Full edit, and General imputation:

1. Single ID   Edits to be performed on an individual case ID. These edits can only be run in the Review and Correction module in the ID by Item and ID Matrix screens.

2. Pre-Edit   Pre-edits can be performed on all case IDs or a subset of case IDs. Often pre-edits contain only a subset of those edit tests included in the "full" edit. Pre-edits are usually run early on in survey processing and include simple edit tests that do not rely on high response rates. Not all surveys will have "pre-edits".

3. Full Edit   Full edits can be run on all case IDS or a subset of case IDs. Full edits are usually run on the entire survey after most of the survey data has been received.

4. General Imputation If an item fails an edit test, then that item will be flagged for imputation in the General Imputation module.

           It IS possible for tests defined in the Edit module to be flagged for the General Imputation event only.

! Edit definitions are stored in the PARMLIB library. Data sets are named as follows:

   EDIT1 (definitions for Required Data Item tests)
   EDIT2 (definitions for Range tests)
   EDIT3 (definitions for List Directed tests)
   EDIT4 (definitions for Skip Pattern Validation tests)
   EDIT5 (definitions for Balance tests)
   EDIT6 (definitions for Survey Rule tests)
   EDIT7 (definitions for Negative tests)

! Once Edit definitions have been added or updated, the SAS code must be generated (both in development and production) in order for the updated tests to be used in the actual edit run. If the code is not generated for newly added tests, the edit will not run because the edit code does not exist. If edit tests are updated and the code is not regenerated, the edit program will use the "old" version of the code, which contains the edit tests as they existed prior to the update.

! You must define the relative statistical periods that will be used in your edit definitions; otherwise the edits will not run. See section 8.1.8 for information on relative statistical periods.

! 2 screens will be provided for defining each type (required data item, balance, range, etc.) of edit:

1. Edit <u>Menu</u> screen   Displays list of existing edit definitions for the particular edit "type" selected. Information shown includes the test number, item name, status of the test, the event (single ID, pre-edit, full edit, general imputation) in which the test will be used, user to last update the test, date/time that the test was last updated. You can add and delete edit definitions from this screen. (This screen is very similar for each of the 7 different types of edit definitions.)

2. Edit <u>Update</u> screen   Allows you to enter the parameters for a new edit definition or modify parameters for an existing definition. (This screen will vary between edit definition types.)

Accessing the Screen

To access the Edit Definition screen:

! Click on the SURVEY SPECIFICATIONS button from the StEPS Main Menu.

! Click on the EDIT DEFINITIONS button from the Survey Specifications menu.

! Select the "Edit Definitions" option to display the following:
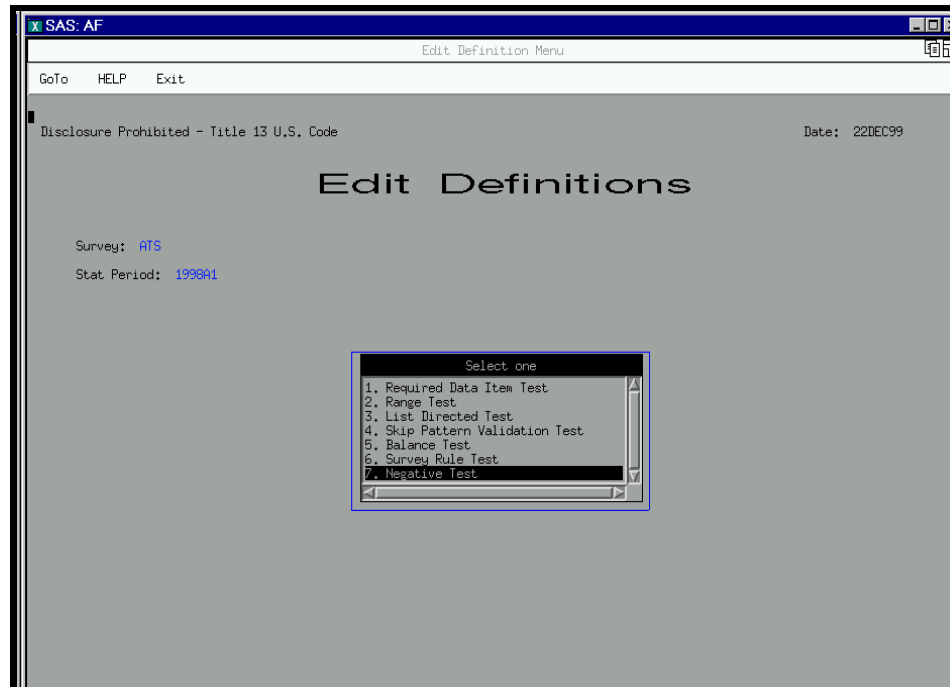
Figure 8.1   Edit Definition Main Menu

Screen Features

Select an edit type using the mouse. An edit menu for the type of test you have just chosen will display. (See sections 8.1.1 - 8.1.7 below, for detailed information regarding each of the seven different types of edits, including instructions on using the edit "menu" and edit "update" screens for each.)

P-Menus

Pmenu	Options	Function
GOTO	Generate/View Code Batch Edit Interactive Edit View Edit Results	Access Generate/View Code screen Access Batch Edit screen Access Interactive Edit screen Access View Edit Results screen

Pmenu	Options	Function
HELP	Edit Definition Help (F1)	Display help information on using the edit definition screens
	WhoamI (F7)	Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen

8.1.1   REQUIRED DATA ITEM TEST

Introduction

The purpose of the "Required Data Item" test is to verify that a data value <u>exists</u> for a specified item in a survey. Data items that are 'required' may NOT contain a data value of missing '.'   If a required data item contains a missing value, an error will occur and an edit reject for that case will be generated.

NOTE: If you are initially migrating your survey to StEPS and wish to specify many items as "required data items", contact the StEPS team. A program has been written that will create the required data item edit definitions. It is a one-time program that can only be used for the initial creation of this particular type of edit file. Any items to be added or updated at a later date must be entered via the definition screens.

To access the Required Data Item menu, select "Required Data Item Test" from the Edit Definition Main Menu. The Required Data Item menu allows you to view, add, update, delete and/or print Required Data Item edit definitions.

Figure 8.1.1a   Required Data Item Edit Menu

Screen Features

! The survey and stat period currently being processed are displayed at the top of the screen.

! Enter test #:

1. Enter the test # of the edit definition you wish to add or update.

2. The test # must be 4-digits.

3. The first digit of a "Required Data Item" test must always be "1". If you are adding a new test, you may assign the remaining three digits to whatever value you choose. Test numbers, therefore, must be "1" + any value from 001- 999 (i.e., 1001, 1002, 1003, 1004.......1999).

! The following columns of information are displayed in the menu screen:

Test #	Test number assigned to the edit definition at the time it was created. The first digit of the test # for all "required data item" tests must be "1".
Data item	The primary data item associated with the test. The data item will be in "fat record" terminology with a prefix (A - adjusted, E - edited, W - weighted, R - reported) and a suffix containing the 2-digit relative stat period. (e.g., ESALES00, where "E" = the edited version of the item, "SALES" = the item name as defined in the Item Data Dictionary, and "00" = the current stat period).
Status	Indicates whether the test is "active", "inactive" or "pending":

	blank	Test is <u>active</u> and will be included in the edit run.
	I	Test is not active and will NOT be included in the edit run.
	P	Test is pending and will NOT be included in the edit run.

Impute	Indicates whether the item in this test will be set for imputation (in the General Imputation module) if it fails this edit test:

	"Y"	Indicates that the item in this test will be set for imputation (in the General Imputation module) if it fails this edit test.
	Blank	Indicates that the item in this test will NOT be set for imputation (in the General Imputation module) if it fails this edit test.

Usrnme	Displays the name of the user who last updated this test definition.
Last Update	Displays the date and time that this edit definition was last updated.
Single ID	Indicates whether this test will be used for single ID edits:

Y	This test will be used for running single ID edits in the Review and Correction module.
blank	This test will NOT be used when running edit tests on single IDs in the Review and Correction module.

Pre Edit   Indicates whether this test will be used in the pre-edit:

Y	This test will be used in the pre-edit.
blank	This test will NOT be used in the pre-edit.

Full Edit   Indicates whether this test will be used in the full edit:

Y	This test will be used in the full edit.
blank	This test will NOT be used in the full edit.

! Fields displayed at the bottom of the screen include the following:

Top row	Displays the test number ("order" in file, not actual test "number") of the edit definition appearing in the first row on the screen.
Total	Displays the total number of Required Data Item tests that currently exist.
Active	Displays the total number of 'active' Required Data Item tests.
Inactive	Displays the total number of 'inactive' Required Data Item tests.
Pending	Displays the total number of Required Data Item tests that are pending.
Last File Update	Displays the date/time that the Required Data Item test definition file was last updated.
Summary	Displays a summary of the Required Data Item edits, including the following: total number of active tests; total number of inactive tests; total number of pending tests; total number of tests set for general imputation, single ID edit, pre-edit, and full edit; the date/time that the edits were last updated; and the date that the development and production code for these edits were last updated.

!   To **ADD** a Required Data Item test:

1. Enter the test number (in the "Test #" field) of the edit definition to be added. (Note: The test number must begin with a '1' to indicate that it is a "required data item" test.)

2. Click on the EDIT p-menu.

3. Select the "Add definition" option to display the following update screen:
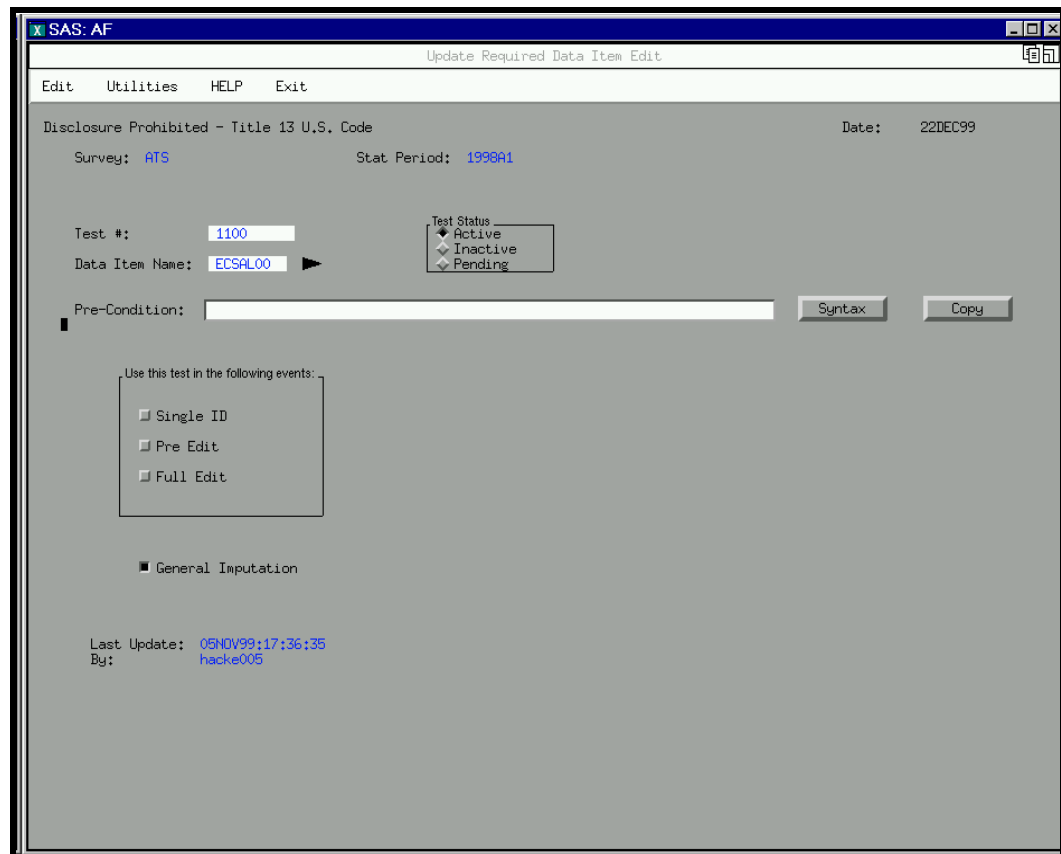
Figure 8.1.1b   Required Data Item Edit Update Screen

Test #   Displays the test number you entered on the Required Data Item menu
                         screen. (This field is not correctable on this screen.)

Data Item Name   Enter the survey data item that is <u>required</u> in the "Data Item Name"
                         field. ("Required" means that the data value for that item cannot be
                         equal to missing ".") The data item name must be entered in "fat
                         record" terminology with a prefix (A, W, E, R) and 2-digit relative stat
                         period suffix (e.g., <u>E</u>SALES<u>00</u>).

                         You may also click on the arrow in the "Data Item Name" field to bring
                         up a pick list of available data items from which to choose. This pick
                         list will contain the "edited" version (prefix = 'E') of the item for the
                         current stat period (suffix = "00").

Test Status   Indicate whether you want the test to be "Active", "Inactive" or
                         "Pending" by clicking on the appropriate radio button.

                         •   Active   Test is active and will be included in the edit run.
                         •   Inactive   Test is not active and will NOT be included in the
                                         edit run.
                         •   Pending   Test is incomplete and will NOT be included in the
                                         edit run.

Pre-condition	Enter a condition (optional) that must be satisfied in order for the edit test to be performed (e.g., perform this edit test if SIC = '36511'). The pre-condition must be entered in SAS format.
	Click on the "Syntax" button to verify that the SAS condition has been entered correctly. Click on the "Copy" button to copy a pre-condition statement from an existing edit test.
Event	Indicate whether you want this test to apply to the single edit, pre-edit and/or full edit. As the default, all of the events will already be selected. Click on the appropriate button to de-select an event.

- • Single ID Test will be used for running single ID edits in the Review and Correction module.

- • Pre Edit Test will be used in the pre-edit.

- • Full Edit Test will be used in the full edit.

General Imputation	Indicate whether or not you want the item in this test to be set for imputation (in the General Imputation module) if it fails the edit test.
Last Update	Displays the date/time that this edit test was last updated. This field is automatically set by the program.
By:	Displays the username of the individual to last update this edit test. This field is automatically set by the program.

4. To add this edit test once the parameters have been entered:

   a. Click on the EDIT p-menu.
   b. Select the "Update test" option or press "F2".

5. To exit this screen without adding the edit definition:

   a. Click on the EDIT p-menu.
   b. Select the "Cancel" option. (You may also press "F3" prior to applying the corrections).

! To **UPDATE** a Required Data Item test:

1. Enter the test number (in the "Test #" field) of the edit definition to be updated. (Note: The test number must begin with a '1'.)

2. Click on the EDIT p-menu.

3. Select the "Update definition" option to display the screen shown in Figure 8.1.1b above.

    (Note: You may also click directly on the test # from the "menu" screen to access the "update" screen for that particular test.)

4. Modify the information in the "Update" screen. (See section on "Adding an edit test" above, for a definition of each field.)

5. Once the information in the screen has been updated, press "F2" to apply the changes.

! To **DELETE** an existing Required Data Item test:

1. Enter the test number (in the "Test #" field) of the edit definition to be deleted.
2. Click on the EDIT p-menu.
3. Select the "Delete definition" option. A confirmation message will display. Click "Yes" to delete the definition; otherwise, click "No".

! To **PRINT** a full or partial list of the existing Required Data Item tests:

1. Click on the UTILITIES p-menu.
2. Select the "Print" option.

! "Required Data Item" test definitions are stored in a data set called EDIT1 in the PARMLIB library.

8.1.2   RANGE TEST

Introduction

The purpose of the "Range" test is to verify that existing data values are within tolerance for a specified data item. A <u>minimum</u> and <u>maximum</u> value are specified and if the data value falls above or below these specified values, the data item is identified as an error and a reject for that case is generated.

To access the Range test menu, select "Range Test" from the Edit Definition Main Menu.   The Range menu allows you to view, add, update, delete and/or print Range edit definitions.

Figure 8.1.2a   Range Edit Menu

Screen Features

! The "Range" test menu is very similar to the "Required Data Item" test menu, with the following exceptions:

1. The Range menu will have 2 additional columns: "Minimum" and "Maximum". "Minimum" will display the minimum value permitted for an item and "Maximum" will display the maximum value permitted for an item.

2. All Range test #'s must begin with "2".

   NOTE: See section 8.1.1 for detailed information on the other fields displayed on this screen.

! To **ADD** a Range test:

1. Enter the test number (in the "Test #" field) of the edit definition to be added. (Note: The test number must begin with a '2' to indicate that it is a "range" test.)

2. Click on the EDIT p-menu.

3. Select the "Add definition" option to display the following update screen:
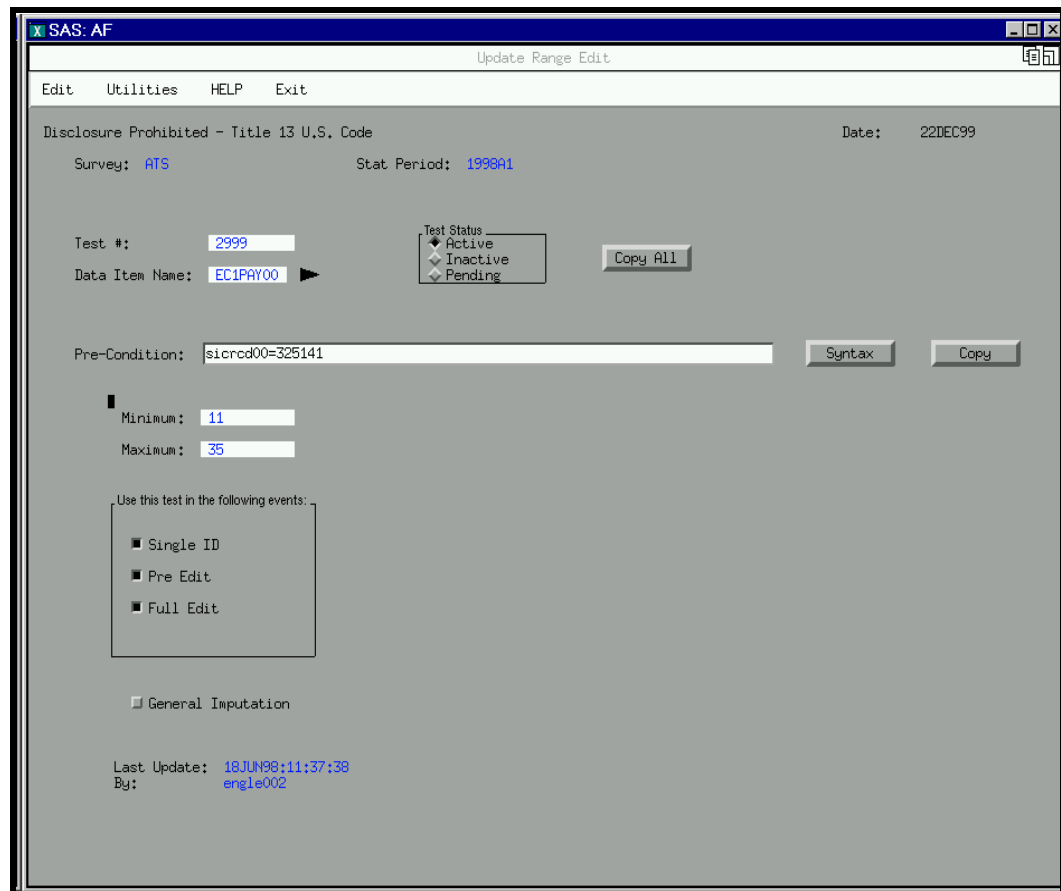
Figure 8.1.2b   Range Edit Update Screen

4. The "Range" Update screen will differ slightly from the "Required Data Item"
    Update screen. In addition to the "Minimum" and "Maximum" fields, the Range
    Edit Update screen will also have a "Copy All" button.

    You may click on the "Copy All" button to bring up a pick list of existing "Range"
    edit tests. Select the test number of the test definition you wish to copy using the
    mouse. This will copy all parameters from the edit definition selected, to the edit
    you are currently adding. You can then modify as appropriate.

    Note: The "Copy All" button will most likely not be used very often for a "range"
            test. It was designed primarily to copy long, more complicated edit
            definitions, such as those found in the "survey rule" edits. You can copy an
            existing edit definition and alter it to create a new test definition. This
            eliminates retyping an entire test.

5. Enter all other information. (See section 8.1.1 for a complete definition of each of
    these fields.)

    Enter the "minimum" and "maximum" values that will be accepted for this item in

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the appropriate fields.

6. Once the parameters have been entered, click on the EDIT p-menu and select the "Update test" option (or press "F2") to add the new "range" definition.

! To **UPDATE** a Range test:

1. Enter the test number (in the "Test #" field) of the edit definition to be updated. (Note: The test number must begin with a '2'.)

2. Click on the EDIT p-menu.

3. Select the "Update definition" option to display the screen shown in Figure 8.1.2b above.

   (Note: You may also click directly on the test # in the "menu" screen to access the "update" screen for that particular test.)

4. Modify the information in the "Update" screen. (See section on "Adding an edit test" above, for a definition of each field.)

5. Once the information has been updated, press "F2" to apply the changes.

! To **DELETE** an existing Range test:

1. Enter the test number (in the "Test #" field) of the edit definition to be deleted.
2. Click on the EDIT p-menu.
3. Select the "Delete definition" option. A confirmation message will display. Click "Yes" to delete the definition; otherwise, click "No".

! To **PRINT** a full or partial list of the existing Range tests:

1. Click on the UTILITIES p-menu.
2. Select the "Print" option.

! "Range" edit definitions are stored in a data set called EDIT2 in the PARMLIB library.

8.1.3 LIST DIRECTED TEST

Introduction

The purpose of the "List Directed" test is to verify that existing data values for an item match pre-defined values in a list. For example, potential data values for an item may be "1", "2", or "3". If a data item has a value other than a "1", "2", or "3", an error will occur and a reject for that case will be generated.

To access the List Directed test menu, select "List Directed Test" from the Edit Definition Main Menu. The List Directed menu allows you to view, add, update, delete and/or print "List Directed" edit definitions.

Figure 8.1.3a   List Directed Edit Menu

Screen Features

! The "List Directed" edit menu is very similar to the "Required Data Item" edit menu, with the following exceptions:

1. The List Directed menu will have a column for "Error List". The "Error List" is the output error message that will appear on the reject file. This error message is specified in the List Directed Update screen when the edit test is first created.

2. The List Directed menu will not display the "Single ID", "Pre-edit", or "Full edit" columns. These can be viewed in the List Directed Update screen.

3. All "List Directed" test numbers must begin with a "3".

   NOTE: See section 8.1.1 for detailed information on the other fields displayed on this screen.

! To **ADD** a List Directed test:

1. Enter the test number (in the "Test #" field) of the edit definition to be added. (Note: The test number must begin with a '3' to indicate that it is a "list directed" test.)

2. Click on the EDIT p-menu.

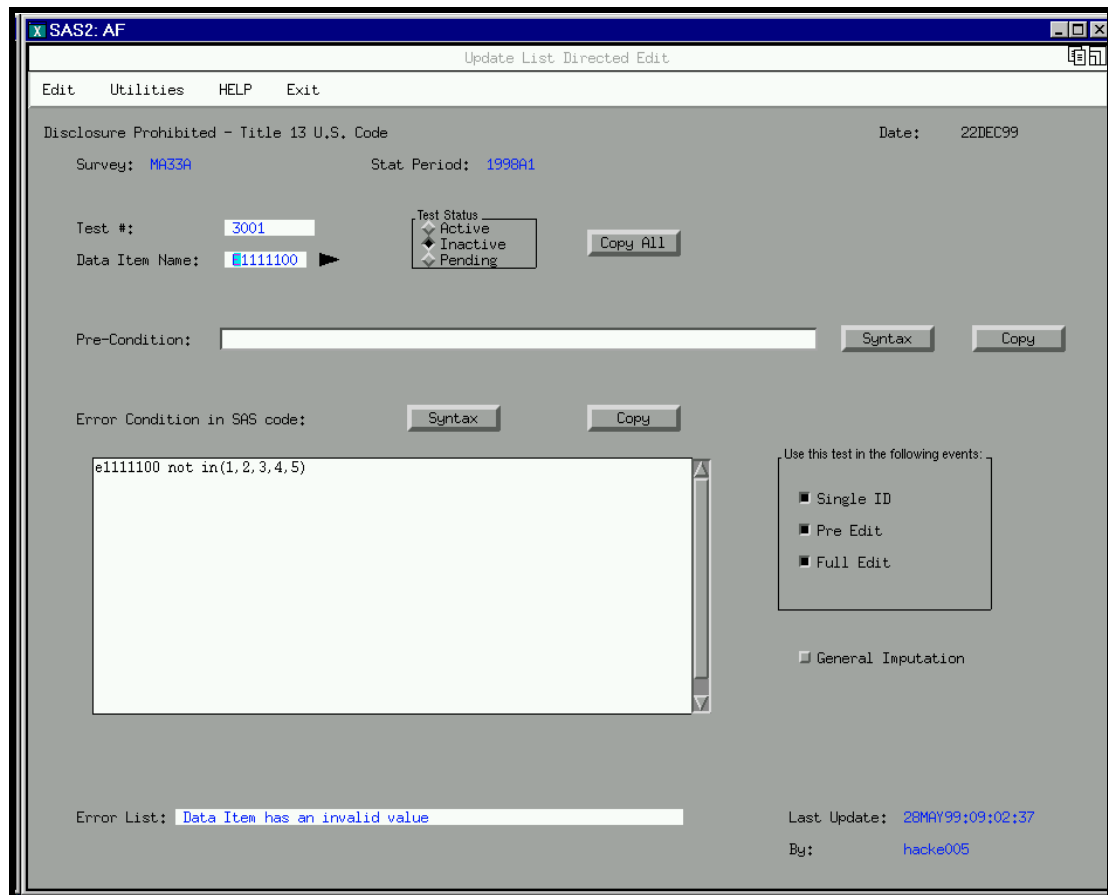3. Select the "Add definition" option to display the following update screen:

Figure 8.1.3b   List Directed Update Screen

4. The "List Directed Update" screen differs from the "Required Data Item Update" and "Range Update" screens. Differences include the following:

    a. There is an "Error Condition in SAS code" box. You must enter the condition for the edit definition using SAS code.

        Example: e2334500 not in (1,2,3,4,5)

        (This means that the edited version of the data, for the current stat period, for item "23345" must have a value of '1', '2', '3', '4', or '5' in order for it to pass this edit test.)

        When you first enter this screen to add a test, there will be default SAS code for this type of test already displayed in the "Error Condition in SAS code" box. Simply type over the "xxxxxxxx" with the correct item name (be sure to enter in "fat record" terminology with a prefix (A, E, W, R) and suffix (2-digit relative stat period). Also enter the values that must exist for this item in the parenthesis.

        Use the "Syntax" button to verify that you have entered the SAS code correctly. Use the "Copy" button to copy an error condition from an existing List Directed test.

       b.   There is a field for "Error List". Enter the error message that you want output on the reject list. The default message will be, "Data item has an invalid value." You may use this message or enter your own.

5.   Enter all other information. (See section 8.1.1 for detailed information on each of these fields.)

6.   Once the parameters have been entered, click on the EDIT p-menu and select the "Update test" option (or press "F2") to add the new "list directed" definition.

!   To **UPDATE** a List Directed test:

1.   Enter the test number (in the "Test #" field) of the edit definition to be updated. (Note: The test number must begin with a '3'.)

2.   Click on the EDIT p-menu.

3.   Select the "Update definition" option to display the screen shown in Figure 8.1.3b above.

   (Note: You may also click directly on the test # in the "menu" screen to access the "update" screen for that particular test.)

4.   Modify the information in the "Update" screen. (See section on "Adding an edit test" above, for a definition of each field.)

5.   Once the information has been updated, press "F2" to apply the changes.

!   To **DELETE** an existing List Directed test:

1.   Enter the test number (in the "Test #" field) of the edit definition to be deleted.
2.   Click on the EDIT p-menu.
3.   Select the "Delete definition" option. A confirmation message will display. Click "Yes" to delete the definition, otherwise, click "No".

!   To **PRINT** a full or partial list of the existing List Directed tests:

1.   Click on the UTILITIES p-menu.
2.   Select the "Print" option.

!   "List Directed" edit definitions are stored in a data set called EDIT3 in the PARMLIB library.

8.1.4   SKIP PATTERN VALIDATION TEST   (Currently not available)

Introduction

The purpose of the Skip Pattern Validation test is to verify that the values of skip items are consistent with the skip instructions provided on the questionnaire. (e.g., if questionnaire instructs respondent to skip to item 15 if they respond "no" to item 10, values for items 11, 12, 13, and 14 would not be expected.)

8.1.5   BALANCE TEST

Introduction

The purpose of the "Balance" test is to verify that the sum of the detail items is equal to the data item total. If the sum of the detail data items does not equal the data item total, an error occurs and a reject for that case is generated.

To access the Balance edit menu, select "Balance Test" from the Edit Definition Main Menu. The Balance menu allows you to view, add, update, delete, and/or print Balance edit definitions.

Figure 8.1.5a   Balance Edit Menu

Screen Features

! The Balance edit menu is very similar to the List Directed edit menu with the following exceptions:

1. There is no column for the "Impute" event. Items that fail balance tests in the edit module cannot be set for imputation because the general imputation module has its own balance complex program.

2. All "Balance" test numbers must begin with a "5".

! To **ADD** a Balance test:

1. Enter the test number (in the "Test #" field) of the edit definition to be added. (Note: The test number must begin with a '5' to indicate that it is a "balance" test.)

2. Click on the EDIT p-menu.

3. Select the "Add definition" option to display the following update screen:

Figure 8.1.5b   Balance Update Screen

4. The "Balance Update" screen is identical to the "List Directed Update" screen with one exception: Balance edit definitions <u>cannot</u> be specified for the "General Imputation" event.

5. Enter the condition for the edit definition using SAS code.

> Example: e2334500 not = sum(e2334100, e2334200, e2334300, e2334400)

> (This means that the edited version of the data, for the current stat period, for item "23345" must equal the sum of the edited version of items 23341, 23342, 23343, and 23344 in order for it to pass this edit test.)

When you first enter this screen to add a test, there will be default SAS code for this type of test already displayed in the "Error Condition in SAS code" box. Simply type over the "xxxxxxxx" with the name of the item containing the total. Be sure to enter the item name in "fat record" terminology with a prefix (A, E, W, R) and suffix (2-digit relative stat period). Also enter the detail items (in the parenthesis) that must add up to the total.

Use the "Syntax" button to verify that you have entered the SAS code correctly. Use the "Copy" button to copy an error condition from an existing Balance test.

6. Enter the error message that you want output on the reject list. The default message will be, "Data item is not in balance." You may use this message or enter your own.

> NOTE: Like the "Range" Update screen, you may use the "Copy All" button to copy the parameters from an existing Balance test to the one you are currently adding. You can then modify as appropriate.

7. Enter all other information. (See section 8.1.1 for detailed information on each of these other fields.)

8. Once the parameters have been entered, click on the EDIT p-menu and select the "Update test" option (or press "F2") to add the new "balance" definition.

! To **UPDATE** a Balance test:

1. Enter the test number (in the "Test #" field) of the edit definition to be updated. (Note: The test number must begin with a '5'.)

2. Click on the EDIT p-menu.

3. Select the "Update definition" option to display the screen shown in Figure 8.1.5b above.

(Note: You may also click directly on the test # in the "menu" screen to access the "update" screen for that particular test.)

4. Modify the information in the "Update" screen. (See section on "Adding an edit test"

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above, for a definition of each field.)

5. Once the information has been updated, press "F2" to apply the changes.

! To **DELETE** an existing Balance test:

1. Enter the test number (in the "Test #" field) of the edit definition to be deleted.
2. Click on the EDIT p-menu.
3. Select the "Delete definition" option. A confirmation message will display. Click "Yes" to delete the definition; otherwise, click "No".

! To **PRINT** a full or partial list of the existing Balance tests:

1. Click on the UTILITIES p-menu.
2. Select the "Print" option.

! "Balance" edit definitions are stored in a data set called EDIT5 in the PARMLIB library.

8.1.6   SURVEY RULE TEST

Introduction

The "Survey Rule" test is a free-form edit test. Survey Rule tests validate complex interitem relationships within an observation. These tests validate that <u>expressions</u> are valid, not that individual data item values are valid. Any test can be entered under Survey Rule, as long as it is syntactically correct.

To access the Survey Rule test menu, select "Survey Rule Test" from the Edit Definition Main Menu screen. The Survey Rule menu allows you to view, add, update, delete, and/or print Survey Rule edit definitions.

Figure 8.1.6a   Survey Rule Edit Menu

Screen Features

! The Survey Rule menu differs from the List Directed menu in that there is no "Item" column. Because Survey Rule tests validate <u>expressions</u>, not individual data items, no one data item can be specified as the test item.

! All "Survey Rule" test numbers must begin with a "6".

> NOTE: See section 8.1.1 for detailed information on the other fields displayed on this screen.

! To **ADD** a Survey Rule test:

1. Enter the test number (in the "Test #" field) of the edit definition to be added. (Note: The test number must begin with a '6' to indicate that it is a "survey rule" test.)

2. Click on the EDIT p-menu.

3. Select the "Add definition" option to display the following update screen:
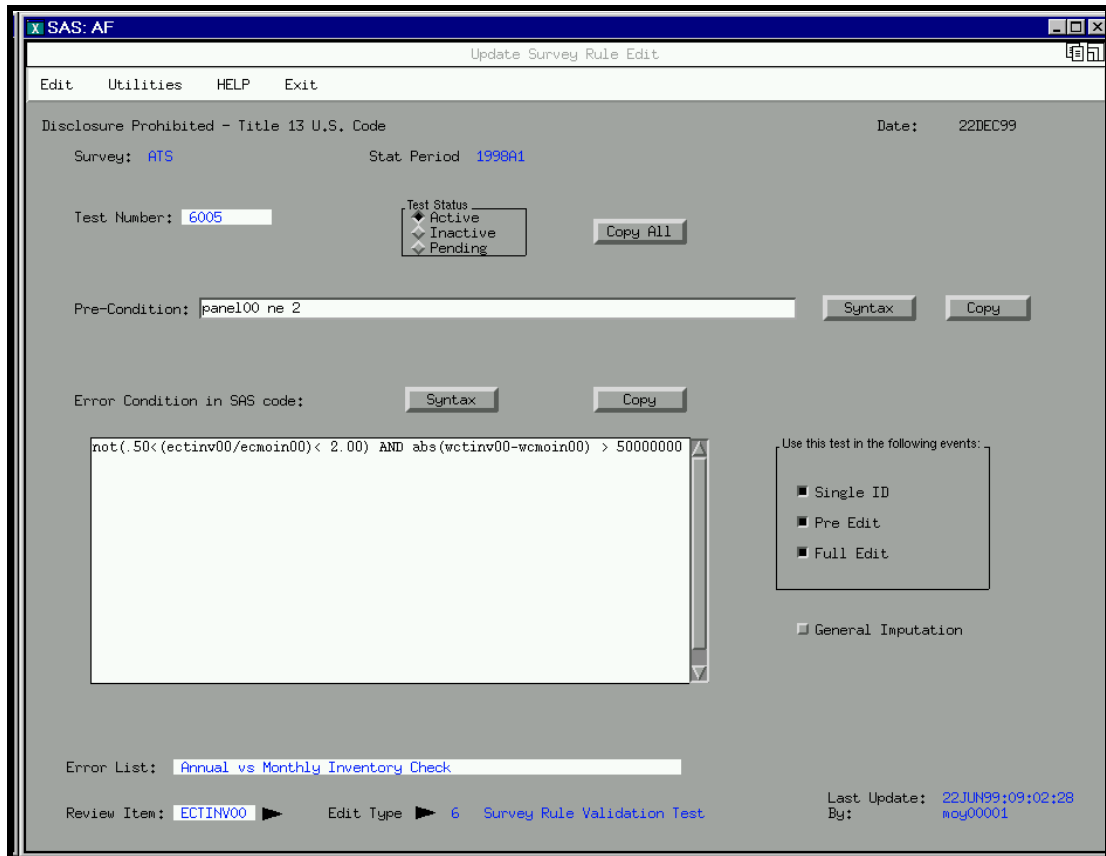
Figure 8.1.6b   Survey Rule Edit Update Screen

4. The "Survey Rule Update" screen differs from the other edit definition update screens in several ways:

    a. Instead of having the "Data Item" displayed at the top of the screen, a "Review Item" is displayed at the bottom of the screen. As stated above, the Survey Rule test validates expressions, not individual data items. For this reason, a data item is not specified; however, the primary <u>review</u> item (should the edit fail) is specified.

        You may enter the review item in the field provided or click on the arrow to display a pick list of items from which to choose.

        NOTE: If you wish to have more than one item as the "review item", you must duplicate the test (using a different test number) for each review item required. For example, if you have an edit test and you wish to have 2 different review items, you must enter the test twice and list a different review item in each one.

    b. "Edit type" is displayed at the bottom of the screen. Since "survey rule" is a catch-all category, it is possible that you may categorize tests defined here as balance, list directed, range, etc. (If a certain type of test appears repeatedly in "survey rule", it

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might be an indication that an existing test needs to be expanded or that an additional category of tests be added.)

Click on the arrow in the "Edit type" field to access a pick list of edit types from which to choose. "Survey Rule" will be the default.

5. Enter the condition for the edit definition in the "Enter Condition in SAS code" box. Unlike the "List Directed" and "Balance" tests, there will be NO default SAS code already displayed.

Use the "Syntax" button to verify that you have entered the SAS code correctly. Use the "Copy" button to copy an error condition from an existing Survey Rule test.

6. Enter the error message that you want output on the reject list.

7. Enter all other information. (See section 8.1.1 for detailed information on each of these other fields.)

8. Once the parameters have been entered, click on the EDIT p-menu and select the "Update test" option (or press "F2") to add the new "survey rule" definition.

! To **UPDATE** a Survey Rule test:

1. Enter the test number (in the "Test #" field) of the edit definition to be updated. (Note: The test number must begin with a '6'.)

2. Click on the EDIT p-menu.

3. Select the "Update definition" option to display the screen shown in Figure 8.1.6b above.

(Note: You may also click directly on the test # in the "menu" screen to access the "update" screen for that particular test.)

4. Modify the information in the "Update" screen. (See section on "Adding an edit test" above, for a definition of each field.)

5. Once the information has been updated, press "F2" to apply the changes.

! To **DELETE** an existing Survey Rule test:

1. Enter the test number (in the "Test #" field) of the edit definition to be deleted.
2. Click on the EDIT p-menu.
3. Select the "Delete definition" option. A confirmation message will display. Click "Yes" to delete the definition, otherwise, click "No".

! To **PRINT** a full or partial list of the existing Survey Rule tests:

1. Click on the UTILITIES p-menu.
2. Select the "Print" option.

! "Survey Rule" edit definitions are stored in a data set called EDIT6 in the PARMLIB library.

8.1.7 NEGATIVE TEST (Currently not available)

Introduction

The purpose of the "Negative" test is to verify that a data item does not contain a negative data value. If it does, an error occurs and a reject for that case is generated.

P-Menus

EDIT DEFINITION "MENU" SCREEN

P-Menu	Options	Function
EDIT	Add definition Delete definition (F6) Update definition (F2)	Access Edit Update screen Delete specified edit definition Access Edit Update screen
UTILITIES	Next page (PgDwn) Previous page (PgUp) Top Bottom Print	Access next screen of edit definitions Access previous screen of edit definitions Access first record (edit definition) Access last record (edit definition) Print edit definitions
HELP	Edit Definitions Help (F1) WhoamI (F7)	Display Help information on defining edits Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen

EDIT DEFINITION "UPDATE" SCREEN

P-Menu	Options	Function
EDIT	Update test (F2) Cancel	Apply changes to database Cancel changes and return to the Edit Menu screen
UTILITIES	Print	Print edit definition currently displayed on screen
HELP	Edit Definitions Help (F1) WhoamI (F7)	Display Help information on defining edits Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen

8.1.8   RELATIVE STATISTICAL PERIODS

Introduction

The "Relative statistical periods" option allows you to define the relative stat period(s) that will be used in your edit test definitions. The edits will NOT run if you have not defined relative stat periods.

"Relative stat period" is a concept used in StEPS to define statistical periods in a general way. Relative stat period "00" represents the current (or base) stat period, "01" represents one stat period back from the base stat period, "02" represents two stat periods back from the base stat period, etc. For example, if you wanted to create an edit definition using a current-to-prior period ratio, you would have to define the relative stat period of "00" for the current stat period and "01" for the previous stat period.

Regardless of how many relative stat periods are used, "00" must <u>always</u> be included, since it represents the base stat period for the survey period being processed. For most surveys, relative stat periods "00" and "01" will be the only ones needed. Relative stat periods need only be defined once for a survey. Once defined, they become the default and will be used for all edit runs, regardless of which stat period you are processing.

Accessing the Screen

!   Click on the SURVEY SPECIFICATIONS button from the StEPS Main Menu.

!   Click on the EDIT DEFINITIONS button from the Survey Specifications Menu.

!   Select the "Relative Statistical Periods" option to display the following:
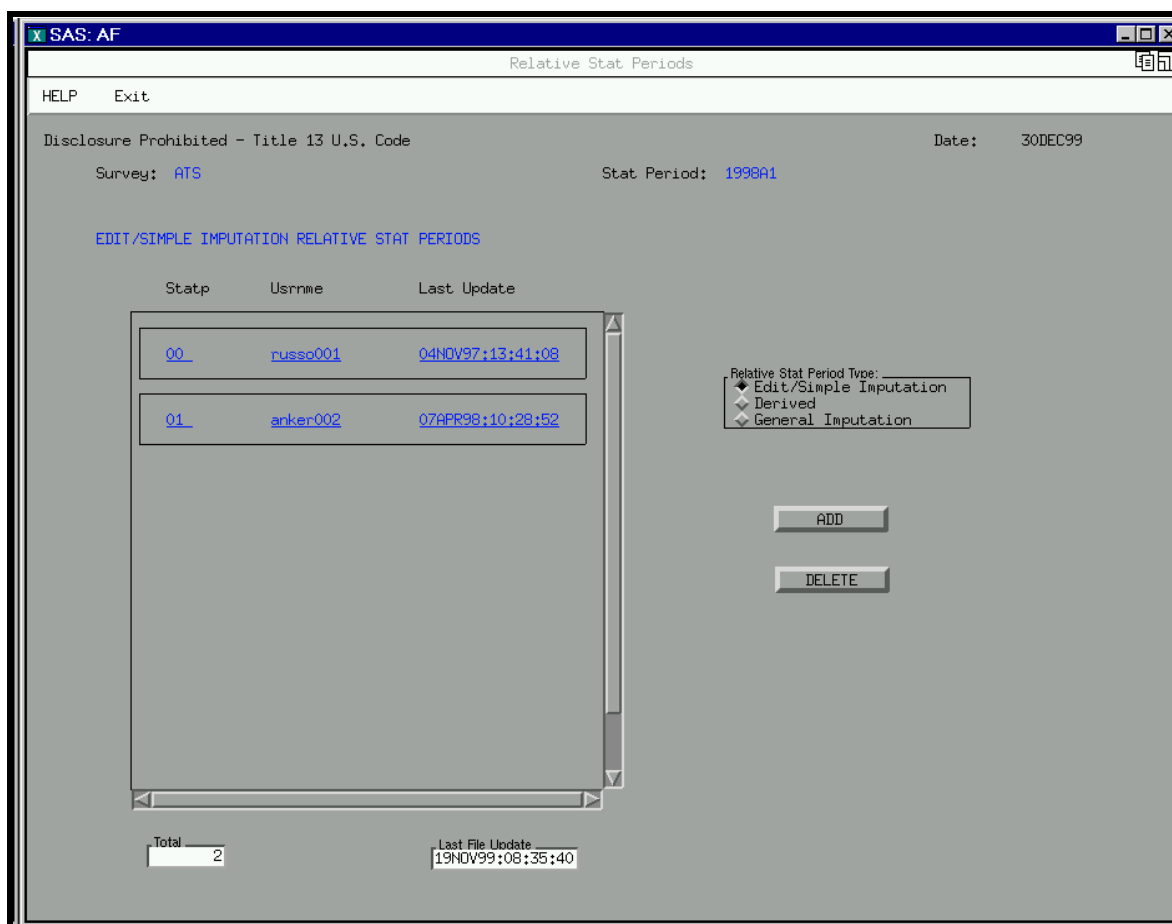
Figure 8.1.8   Define Relative Stat Periods Screen

Screen Features

! Relative stat periods must be defined not only for "edit" tests, but also for General Imputation and Derived items. The relative statistical periods defined for each of these other processes are accessed via this same screen. Click on the Edit/Simple Imputation button in the radio box on the right side of the screen to access the relative stat periods used for the "Edits". (This should be the default.)

! The relative stat periods that have already been defined for the survey edit definitions will display in the box on the left side of the screen. Columns of information include the following:

Statp   Relative stat period to be used in the edit definitions ('00' = current stat period, '01' = 1 stat period back, '02' = 2 stat periods back, etc.)

Usernme   Username of the person who last entered/updated the relative stat period specified.

Last Update   The date/time that the specified relative stat period was last updated.

! To ADD a relative statistical period:

1.   Click on the ADD button to display a pick list of available relative stat periods.

2.   Click on the relative stat period you wish to add. (You may only add one relative stat period at a time.)

3.   Click on the "OK" button at the bottom of the screen to add the relative statistical period; otherwise, click "Cancel".

4.   The newly added relative stat period should now display in the box on the left side of the screen.

! To DELETE a relative statistical period:

1.   Click on the DELETE button to display a pick list of relative stat periods. Only those relative stat periods that had previously been defined for your survey will be included in this list.

2.   Click on the relative stat period you wish to delete. (You may only delete one relative stat period at a time.)

3.   A confirmation message will display. Click on "Yes" to delete the relative stat period; otherwise, click "No".

P-Menus

P-menu	Options	Function
HELP	Relative Stat Period Help (F1) WhoamI (F7)	Display help information on using the Relative Stat Period screen Display user default and systems information
EXIT	StEPS Main Menu (Home) Exit (F3)	Return to StEPS Main Menu Exit to previous screen